



MS Office 2010

Word Track Changes Manual

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Track Changes

Introduction

The Track Changes feature is used for marking up changes to a document on-screen. This is more efficient than marking revisions on a paper copy which then have to be typed up. The owner of the document may want one or more people to proof the document and Track Changes allows them to make suggested edits to that document. To complete the process the owner must accept or reject the changes so that the document is fully updated. If the Track Changes are not accepted or rejected, then the 'markup' will always be available to view, even if they are not literally visible when the document is opened.

There are Options that the user can set to determine how the inserted and deleted text is displayed on the document. There is also the optional Balloon feature that shows edits in the margin to the right of the document.

Track Changes edits are referred to as 'Markup'. There are options for showing the Markup in a series of ways, such as being able to view the document as if all the changes had been accepted.

If more than one person makes revisions to a document, their revision marks will be displayed in a different colour. Word also displays the name of the user that made the revision and on what date.

Distributing a document for review is a complete, integrated process. When you send a document for review, Word automatically creates a review request form; enables and displays the reviewing tools when a reviewer receives the document; and prompts you to merge changes when the reviewed copy is returned. You can then use the reviewing tools to accept or reject the changes



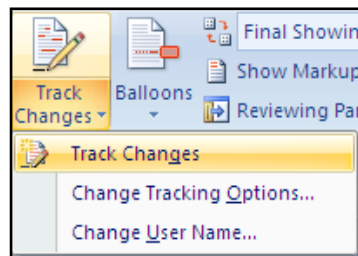
Tracking Changes

To start tracking your changes, you need to switch the Track Changes feature on. When you have finished marking up your document and you want to edit without tracking the changes you need to switch off Track Changes. This is a toggle option.

Switching Track Changes On/Off

To switch Track Changes on or off:

- Click on the **TRACK CHANGES** drop down button in the **TRACKING GROUP** on the **REVIEW RIBBON**
- Select **TRACK CHANGES**



Alternatively:

- Use the keystroke **CTRL+SHIFT+E** to switch the Track Changes on/off

When Track Changes is switched on, the button on the ribbon will be displayed in orange. The status bar can also be set to show the Track Changes status.

Reviewing Changes

As you review the Markup in your document, you can accept or reject each change. Until you accept or reject all the Track Changes in a document, even hidden changes will appear to viewers in documents you send or display.

Reviewing a Summary of Tracked Changes

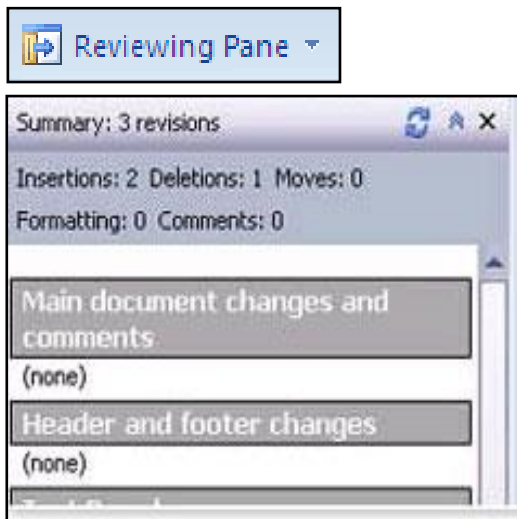
The Reviewing Pane is a handy tool for ensuring that all tracked changes have been removed from your document and will not show up to others who might view your document. The summary section at the top of the Reviewing Pane displays the exact number of visible tracked changes and comments that remain in your document.

The Reviewing Pane also allows you to read long comments that do not fit within a comment bubble.

The Reviewing Pane, unlike the document or the comment bubbles, is not the best tool for making changes to your document. Instead of deleting text or comments or making other changes in the Reviewing Pane, make all editorial changes in the document. The changes will then be visible in the Reviewing Pane.

To review changes in the reviewing pane:

- Click on the **REVIEWING PANE** button in the **TRACKING** group on the **REVIEW** ribbon to view the summary at the side of your screen



- To view the summary across the bottom of your screen instead of on the side of your screen, click the arrow next to the **REVIEWING PANE** button, and then select **REVIEWING PANE VERTICAL**

The summary at the top of the panel can be toggled on and off by clicking on the chevron in the top right corner of the reviewing pane.

Reviewing Individual Track Changes

To review each tracked change and comment in sequence:

- Click **NEXT** or **PREVIOUS** in the **CHANGES** group on the **REVIEW** ribbon
- Click on either the **ACCEPT** button or the **REJECT** button to accept or reject the change



- Repeat the process until all the changes have been accepted or rejected

*To ensure all tracked changes are accepted or rejected view the **REVIEWING PANE**. The summary section at the top of the **REVIEWING PANE** displays the exact number of tracked changes that remain in your document.*

Accepting all Changes

To accept all the changes in the document at once:

- Click **NEXT** or **PREVIOUS**, in the **CHANGES** group on the **REVIEW** ribbon
- Click on the arrow button below **ACCEPT**
- Select **ACCEPT ALL CHANGES IN DOCUMENT**

Rejecting all Changes

To reject all the changes in the document at once:

- Click **NEXT** or **PREVIOUS** in the **CHANGES** group on the **REVIEW** ribbon
- Click on the arrow button below **REJECT**
- Select **REJECT ALL CHANGES IN DOCUMENT**

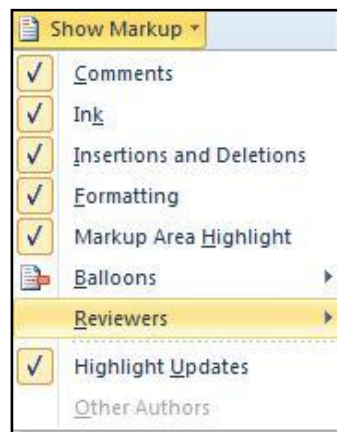
Reviewing changes by edit type or reviewer

To review changes by a specific type of edit:

- Click on the arrow next to **SHOW MARKUP** in the **TRACKING** group on the **REVIEW** ribbon



- Deselect all ticked boxes except for the ones next to the types of changes that you want to review



To review changes by a specific reviewer:

- Click on the arrow next to **SHOW MARKUP** in the **TRACKING** group on the **REVIEW** ribbon
- Point to **REVIEWERS**, and then deselect all the check boxes except for the ones next to the names of the reviewers whose changes you want to review
- To select or deselect the check boxes for all reviewers in the list, click **ALL REVIEWERS**

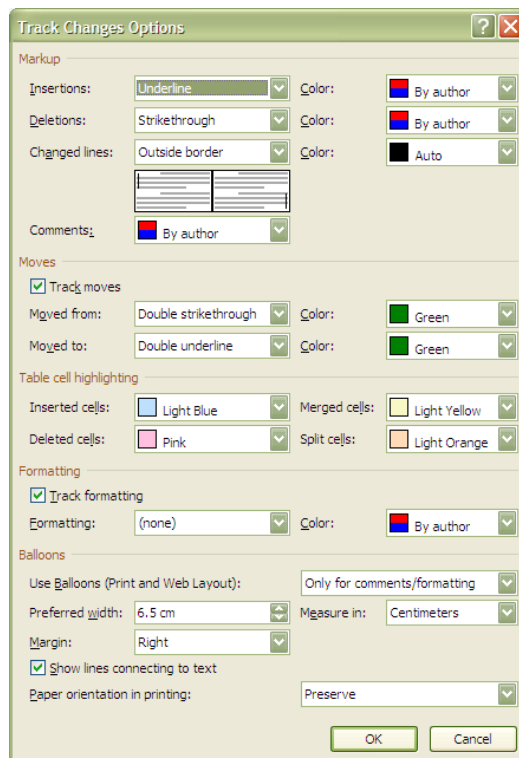
Track Changes Options

The Track Changes options allow the user to change the way the Markup is shown in the document. By default, insertions are shown in underline and deletions are shown in strikethrough. Other options include changing where the 'changed lines' are shown, the colours that edits are shown in, whether formatting is being tracked and whether to have balloons showing deletions in the right margin.

Setting Track Changes options

To change the formats of the Markup in your document:

- Choose the drop down arrow on the **TRACK CHANGES** button in the **TRACKING** group on the **REVIEW** ribbon
- Select **TRACK CHANGES OPTIONS**



- **THE INSERTIONS** option is set by default to 'underline' - click on the drop down arrow button to change if required
- **THE DELETIONS** option is set by default to 'strikethrough' - click on the drop down arrow button to change if required
- The **CHANGED LINES** option is set by default to 'outside border' - click on the drop down arrow button to change if required
- Click on **OK** to accept the settings

Balloons

The Balloons feature is used to show the Markup in boxes to the side of the document. When the Balloons are switched on, the on-screen view of the document will shrink to fit the balloons on the page. When the Balloons are in use the user can choose whether to print the Markup, so it is not necessary to switch off the Balloons to print. There is a button on the ribbon that can be used to quickly switch between using the Balloons or not. The settings for the Balloons are found in the Track Changes options dialog box.

Switching Balloons On/Off

To switch the Balloons feature on:

- Click on **SHOW MARKUP** in the **TRACKING** group on the **REVIEW** ribbon
- Select **BALLOONS** to view the sub menu
- Select **SHOW REVISIONS IN BALLOONS**

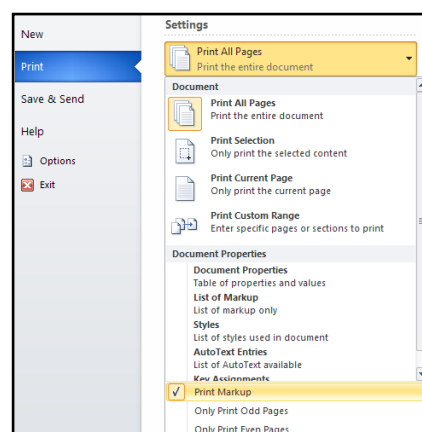
To switch the Balloons feature off:

- Click on **SHOW MARKUP** in the **TRACKING** group on the **REVIEW** ribbon
- Select **BALLOONS** to view the sub menu
- Select **SHOW ALL REVISIONS INLINE**

Printing with Balloons

To print your document when Balloons are showing:

- Go to the **FILE TAB** on the ribbon
- Select **PRINT**
- Click on the **PRINT ALL PAGES** button in the **SETTINGS** section
- Select **PRINT MARKUP** to include the Balloons on the printout
- Click on **PRINT**



Markup Views

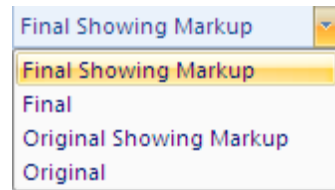
When Track Changes is switched on it is possible to change the view of the document so that the actual edits are not in view. Users need to make sure that eventually all Track Changes are Accepted or Rejected no matter what Markup View is being used.

Hiding revision marks

How to hide revision marks:

- Click on **FINAL SHOWING MARKUP**
- Select **FINAL**

This will hide all the revisions and show you the document as if all the changes had been accepted.



Showing original document

How to show the original document without Markup:

- Click on Final Showing Markup
- Select Original

This will hide all the revisions and show you the document as if all the changes had been rejected.

The Track Changes are hidden in these views and will still need to be accepted or rejected to finish the process.

Protection - Track Changes

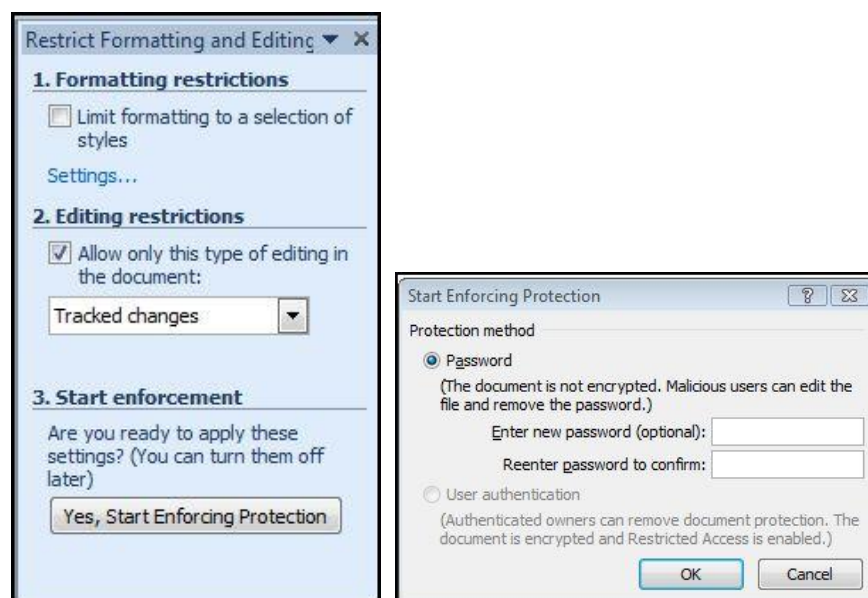
If you save a file with the Track Changes switched on, then any other person who opens the file will automatically be marking revisions when they edit the text. However, they are able to turn off the Track Changes and edit as normal.

To prevent someone from turning the Track Changes feature off, you would need to lock the document. You can also include a password so that only users who know the password can then unlock the document and turn off the Track Changes. The original author would still be able to edit the document and accept or reject the revisions.

Locking a document

To lock a document:

- Choose **RESTRICT EDITING** from the **PROTECT** group on the **REVIEW** ribbon
- In the **EDITING RESTRICTIONS** area of the task pane, tick the option to **ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT**
- Select **TRACK CHANGES** from the drop down list



- Click on **YES, START ENFORCING PROTECTION**
- Enter a password in the dialog box that appears if required
- Click on **OK**

Unlocking a document

To unlock a protected document:

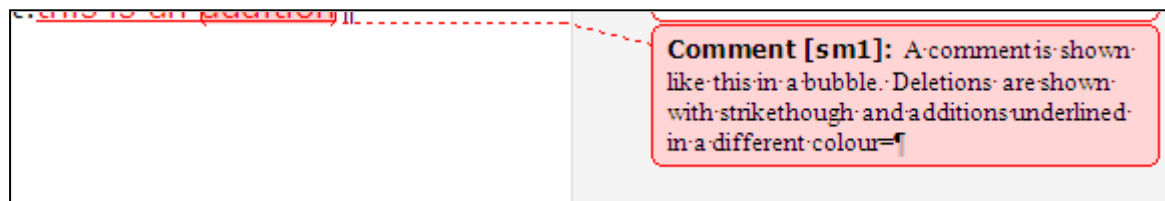
- Choose **RESTRICT EDITING** from the **PROTECT** group on the **REVIEW** ribbon
- At the bottom of the task pane click on the **STOP PROTECTION** button
- You will be prompted to enter the password if one was originally added

Encryption to protect against malicious users will need windows rights management and a Digital signature.

Comments

Comments are initialled and numbered annotations (like footnotes and endnotes) that are written and appear in a Balloon so that they do not affect the document text. The feature is useful if you are reviewing a document and merely want to make suggestions or comments rather than actually make editing changes or revision marks.

An addition to this feature is the ability to "lock" a document against editing changes being made by anyone other than the author, but still allow comments to be added. This means the document cannot be altered.



Inserting a Comment

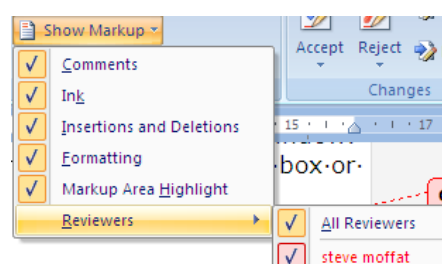
To add a comment to a document:

- Position the insertion point next to the text to be commented upon
- Click **NEW COMMENT** from the **COMMENTS** group on the **REVIEW** ribbon
- In the Comment bubble to the right, your initials will be displayed and next to these you can type in your text
- A dotted line will lead to the insertion point of the Comment

Viewing by Reviewer

To view comments added by a specific person:

- Click on **SHOW MARKUP** in the **TRACKING** group on the **REVIEW** ribbon
- Select **COMMENTS** only
- Click on **SHOW MARKUP** again
- Select **REVIEWERS** to show the sub menu
- Select and deselect the names of the reviewers as required
- Use the **NEXT** and **PREVIOUS** buttons in the **COMMENTS** group to move through your comments for that person

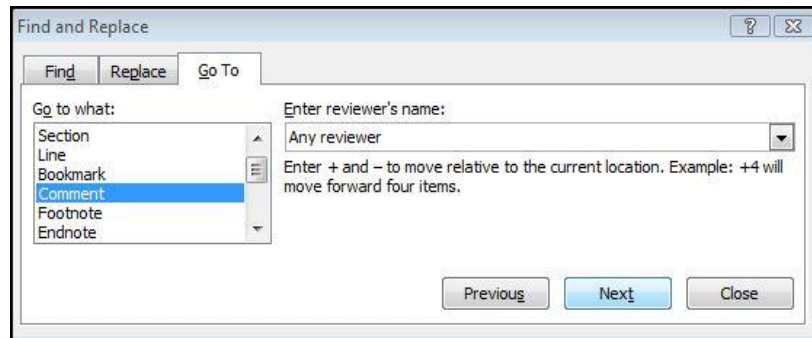


Finding Comments

Comments, like footnote marks or bookmarks, can be found using the Go To feature.

To find comments using Go To:

- Ensure **FINAL SHOWING MARKUP** is selected in the **TRACKING** group on the **REVIEW** ribbon
- Press **F5** to open the **Go To** dialog box
- Select the **Go To** tab



- Select **COMMENT** in the **GO TO WHAT** list
- Choose either **ANY REVIEWER** or a specific reviewer from the **ENTER REVIEWER'S NAME** drop-down list
- Click on **NEXT** to find the next comment, or **PREVIOUS** to search back through the document
- Click on **CLOSE** when finished

Deleting Comments

To delete a comment:

- Locate the **COMMENT** within the document
- Click into the **COMMENT** so it is selected
- Click on **DELETE** in the **COMMENTS** group on the **REVIEW** ribbon

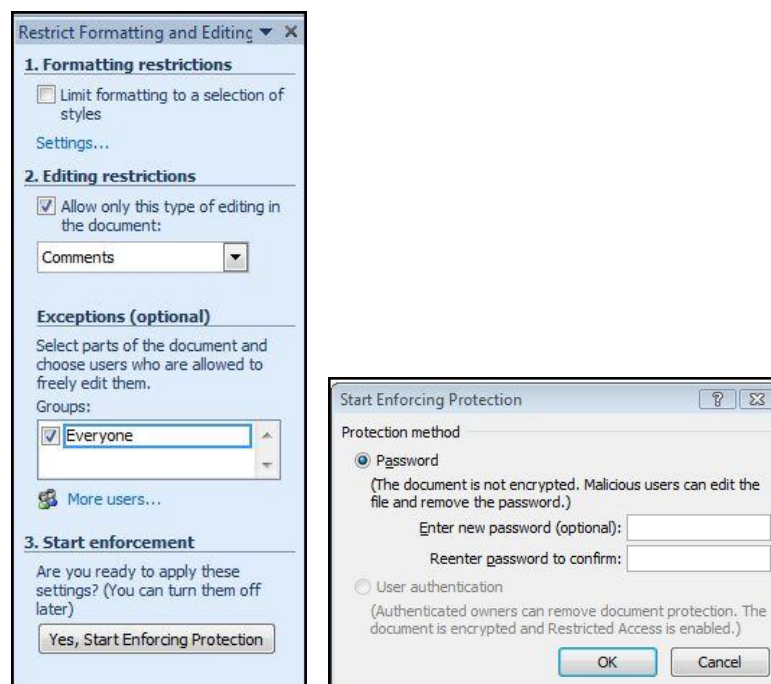
Protection – Comments Only

As well as being able to lock a document so that other users can only view and print, you are able to set Protection settings so those users can add Comments. The original author is still able to edit the document.

Locking/unlocking a document

To lock a document:

- Click on **RESTRICT EDITING** in the **PROTECT** group on the **REVIEW** ribbon
- Tick the option **ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT**
- Select **COMMENTS** from the dropdown list
- Select exceptions if required
- Click on **YES, START ENFORCING PROTECTION**
- Enter a password if required
- Click on **OK**



To unlock a protected document:

- Click on **RESTRICT EDITING** in the **PROTECT** group on the **REVIEW** ribbon
- Click on **STOP PROTECTION** button at the bottom of the panel
- Enter the password if originally set

Encryption to protect against malicious users needs windows rights management and a Digital signature.

Printing Comments

There is an option to print Comments along with your document as shown when in Print Layout View. There is also a print option that allows you to print just the Markup, so it prints in a list without the document text.

Before you print the document, switch to Print Layout view and display the Track Changes and Comments the way that you want them to appear in the printed document.

Printing documents with Comments

To print a document with Comments:

- Click on **SHOW MARKUP** in the **TRACKING** group on the **REVIEW** ribbon
- Select **COMMENTS** (if not already selected)
- Click on the **FILE TAB**
- Select **PRINT**
- Click on the **PRINT ALL PAGES** option button
- Select **PRINT MARKUP**
- Click on **PRINT**

Note that other Markup may be printed too, depending on whether it is in view on the document in Print Layout View.

Printing Markup only

To print Markup only, as a list:

- Click on the **FILE TAB**
- Select **PRINT**
- Click on the **PRINT ALL PAGES** option
- Select **LIST OF MARKUP** under **DOCUMENT PROPERTIES**
- Click on **PRINT**

